

ROUNDTABLE DISCUSSIONS

3:55 – 4:25 PM

MC: Rachel Horning, Cooley LLP

AI and the Future of Customer Service

Anuj Bhalla, serviceMob

As AI, bots, and large language models (LLMs) become more integrated into customer service, will human agents become obsolete? This roundtable will explore how AI can augment agents, improve KPIs, and streamline operations, while also addressing why human agents remain vital. Given the rise in complex, edge-case scenarios reaching humans, and the need for human-generated data to train AI on high-fidelity problem-solving, we'll discuss why humans may lead the way in resolving issues for the foreseeable future. Join this discussion on how AI is reshaping customer service, but why humans are still critical in driving quality outcomes.

Monetizing Your Payments Integration

Dustin Siner, Payarc

Navigating the complex landscape of electronic payments can be overwhelming, but understanding the options for monetizing them is crucial for businesses. From becoming a PayFac to partnering with an ISO, this talk explores the key models available to manage and profit from your payment processing. Discover how each option works, the benefits they offer, and how to choose the right fit for your business to optimize revenue and streamline your payment operations.

Productivity: Working Smarter, Not Harder

JJ Janks, Desert Diva LLC

A discussion about tools and tips on leveraging the way your brain works to get more accomplished during an average day so you don't have to burn the candle at both ends.

Unlocking Sales Growth

Jennifer Apy & Kim Salzer, Chief Outsiders

Join top-notch seasoned marketers in an engaging roundtable for investors and business leaders who want their companies to get to the next level of growth and achieve their goals in 2025. We will share our insights on driving sales growth in today's competitive landscape, and discuss common pitfalls that lead to wasted marketing dollars and squandered sales efforts. Join us if you want to build a foundation for growth and ensure your company does not succumb to random acts of marketing. Whether you're looking to refine your approach or ignite new ideas, this conversation is a must-attend for anyone eager to achieve results.

SaaS M&A in 2024: Four Trending Legal Considerations

Jonathan Friedman, Stubbs Alderton & Markiles, LLP

The M&A market has gotten tougher overall, and SaaS companies face a more challenging environment as multiples have dropped and fewer transactions are being executed. We will talk about key issues in today's market, especially in the due diligence process to ensure a smooth transition and protect stakeholder interests.

The Power of Internal Motivation: If They Wanna, They're Gonna!

Kristen Snyder, Insperity

Achieving disciplined, profitable growth hinges on a team's internal drive, where failure isn't an option. However, traditional management practices often dampen this intrinsic motivation. Join us to discover the five key factors that fuel internal motivation in everyone. You'll also gain a practical tool to guide performance conversations, leaving your team inspired and eager to contribute more.

Continued on next page →

ROUNDTABLE DISCUSSIONS

3:55 – 4:25 PM

4 Keys to Best Practices in Managing Subscriptions and Revenue Recognition

Louis Balla, Nuage

Join Nuage for a roundtable discussion on 4 Keys to Best Practices in Managing Subscriptions and Revenue Recognition. With the power of NetSuite ERP, our team provides expert guidance on managing subscriptions and revenue recognition by focusing on automation, compliance with ASC 606, and ensuring accurate financial reporting.

Partnerships: Scaling One-to-Many Sales Strategies

Mark Wasiljew, Breakmark Consulting Group

This discussion will focus on how to unlock strategic partnerships that will give you thousands of warm customer leads. Mark will challenge you to examine what you bring to the marketplace and how you can help larger businesses so they will be happy to reciprocate.

AI Knows Your Job: Let It Do the Work While You Lead the Way

Monica Higgins

How AI can handle the repetitive parts of your role, allowing you to focus on leadership and higher-value tasks.

Fundraising Tips from a VC

Santhosh Devati, Anamika Ventures

Ask me Anything (AMA) about Fundraising and Startup Investing.

Critical SaaS Metrics: What to Measure and When

Theresa Robarge, Oracle Netsuite

We will discuss essential metrics for early and growth-stage SaaS businesses. Topics include: how to start tracking metrics, common issues with data, and how to improve reporting and decisions.

Scaling B2B SaaS: Fully Automated PLG & SLG Revenue Operations

Thomas Pedersen, Bunny

Most SaaS companies begin with self-service and Stripe for card payments. The first custom deals are what land you in trouble, which means manual processes, errors, and inflexibility. A strong B2B subscription foundation will enable you to scale your business faster.

Finding Capital: Where to look and How to Access

Tim Arnold, Steamwork Ventures

Best practices for early-stage equity-based financing and debt financing options for growing companies. Tim Arnold is an experienced investor, entrepreneur, and CEO with a successful track record spanning a multitude of industries. He is a General Partner at Steamwork Ventures, an early-stage VC that invests in SaaS businesses.